

VIII. Abstract

A system and process linking an external computer with a system of a lending institution, a market information vendor or brokerage company, to provide for simultaneous
5 tracking of one or more investments by a Plan to ensure each Plan's investment provides adequate collateral for the lender. Further, the system provides access to Plan component values via electronic means to the various parties of interest; the Plan participant, the Plan administrator, the Plan lender, and the Plan sponsor. Finally, the system creates forecasts of a
10 Plan using assumptions to enable a reader of the illustration to understand the employee participant and employer sponsor benefits and costs of the program.